

FORMS DESIGN COLLABORATOR ROLE

Role Summary

The Forms Design Collaborator Role consists of one grade level (13). Incumbent facilitates and oversees the maintenance and implementation of department forms by managing, analyzing, and coordinating the design and development of all forms, instructions, publications, and coupons both electronic and paper for all tax types used by taxpayers and agency partners. Incumbent is responsible for review, design, and research for improved efficiency, simplification, and customer service. Primary contacts are with department staff, taxpayers, tax preparers, division administrators, bureau chiefs, regional managers, area managers, unit managers, information technology staff, and vendors.

Working Conditions

Periods of high stress, often weeks at a time, as a result of critical deadlines, managing a heavy workload, the technical nature of the work, and the significance of decisions made. Considerable time is spent at a computer terminal.

Education and Experience

Grade 13: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to Bachelor's degree in business administration, public administration, or related field and three years of experience in technical writing and editing, contract management, project leadership, and forms technology including PageMaker, Publisher, Word, or similar software. Other combinations of education and experience will be evaluated on an individual basis.

Department Core Competencies

In addition to the role specific competencies, there are four, department core competencies that all employees are expected to successfully achieve. These are:

- *Interpersonal Skills:* Builds constructive and effective relationships with internal and external customers and is committed to meeting customer needs in a timely and accurate manner. Listens actively and attentively and demonstrates an appreciation of other perspectives. Builds the appropriate rapport required to do business. Openly demonstrates an understanding of and respect for the value of co-workers' contributions to the department mission.
- *Decision-Making and Accountability:* Considers the department's vision, mission, and values in making decisions and taking actions. Identifies and considers possible alternatives before making decisions. Bases decisions on achieving desired outcomes pursuant to the departmental business plan or management direction. Uses a combination of analysis, experience, and sound judgment that results in fairness and consistency, while being accountable for actions. When serious ethical issues are at stake, takes all necessary actions.
- *Commitment to Continuous Improvement:* Ability and willingness to continually seek greater efficiency in agency programs, is results driven, and meets changing requirements in work or direction. Adapts to changing conditions and work responsibilities. Accepts constructive criticism and suggestions and uses them to improve performance.

- *Personal and Work Ethics:* Creates own measures of excellence, and practices what he/she promotes. Sets goals that provide challenges and measures goal attainment regularly. Displays a contagious optimism about the work to be done. Goes beyond traditional ways to address issues despite obstacles or resistance. Is able to generate ideas, fresh perspectives, and original approaches and engages in open-minded thinking. Employs strategies to promote ideas and proposals to increase probability of acceptance. Mentors others to improve the performance necessary to achieve success. Reflects a belief that the results achieved are a direct result of his/her personal decisions and actions.

Grade Levels

Each grade level lists the essential duties that describe work performed 50 percent or more of the time (predominant work). Established work plans identify day-to-day tasks.

Grade 13

Predominant/Essential Duties

- Coordinate and facilitate a plan to improve, standardize, simplify, analyze, and review current forms, booklets, scannable coupons, and correspondence to identify where they may be enhanced.
- Identify areas that may be enhanced from the application of new forms technology. Examine the effectiveness of the technology and/or software. Analyze, develop, and implement new technology into the production of forms.
- Analyze existing department processes to understand how new forms technology may be applied.
- Evaluate the forms and how they are processed and determine the best way to accomplish desired results.
- Serve as project manager for various forms projects. Determine project requirements taking into account department resources in terms of staff, equipment, etc.
- Outline a course of action and develop a viable work plan which is carried to completion.
- Facilitate groups on form structure, revision, readability, use, compliance, accuracy, and consistency. Select appropriate participants to determine impacts of federal and state law changes.
- Select persons within the department and among the public to assist with changes to tax booklets, forms, and instructions to comply with current tax laws or for when clarification is needed.
- Coordinate and monitor meetings with CPAs and other accounting entities as a means of input to forms design.
- Communicate forms needs to vendors, printers, other divisions, programmers, and scanning technicians.
- Draft, review, and edit forms, booklets, instructions, coupons, etc. in a manner easily understood by the public and in compliance with department writing requirements. Select suitable language so the complicated laws will be followed when filing a return.
- Develop fill-in and self calculating forms to be placed on the Internet.
- Develop test scripts and guidelines for the reproduction of forms and coordinate with programmers for tests of production data.
- Work with affected divisions to ensure their issues are addressed.
- Organize and direct the selection process for printing contracts.
- Work closely with printers and vendors; overseeing production of form printing, formatting, and mass mailing specifications.

- Serve as the department's representative to control and approve printing at the vendor's place of business.
- Immediate approval and signing off on press-checks is necessary and quick decisions must be made when problems arise. Accuracy and timely completion of printing projects hinges on the incumbent's expertise.
- Outline a marketing strategy to educate and inform taxpayers of changes to forms and instructions.
- Act as liaison between affected department work units, taxpayers, tax preparers, federal government entities, outside vendors, and software developers.
- Coordinate distribution and mailing of forms.
- Ensure forms, publications, etc. are updated on the Internet.
- Approve computer generated forms from several software companies ensuring their versions of department forms are in compliance with policy and state tax law.
- Coordinate the testing and approval of coupons created by vendors and software companies.
- Maintain electronic forms repository.
- Provide support to taxpayers and department employees regarding forms and processing.
- Compile statistics of form accuracy, ability to scan, cost, and quantities of forms ordered and make determinations based on statistical data.
- Research and compile specialized reports.

Competencies and Degrees of Proficiency

The Competency/Proficiency Chart identifies the role specific competencies, degrees of proficiency, and guidance required for each grade level. Role specific competencies describe the knowledge, skills, and abilities required to perform the essential duties. The degrees of proficiency indicate the difficulty and/or complexity level of the tasks and assignments.

Competency/Proficiency Chart - Forms Design Specialist Role

Competencies	Grade 13 Minimal Guidance
Demonstrated ability to work on multiple tasks and manage time effectively.	C
Demonstrated ability to provide timely and effective written, oral, and interpersonal communication.	C
Demonstrated ability to think creatively and recommend innovative solutions.	C
Demonstrated knowledge of department business processes and ability to apply that knowledge effectively.	B
Demonstrated knowledge and effective application of federal/state statutes, administrative rules, and state policies and procedures relative to the role.	B
Demonstrated knowledge of individual tax types and their relationships within the organization.	B
Demonstrated knowledge in the control and management of publications, forms, etc.	C
Demonstrated knowledge and skill of word processing, spreadsheet, database, desktop publishing, and software applications/programs relative to the role.	C
Demonstrated knowledge of forms related processing technologies and their applications.	C
Demonstrated ability to formulate a strategy for successful implementation of projects.	C
Demonstrated knowledge of printing terminology methods and overall aspects of the printing field.	B
Demonstrated knowledge of contract requirements.	B
Demonstrated research skill relative to the role.	B
Demonstrated ability to establish and maintain effective working relationships with coworkers, other agencies, and the public.	C
Demonstrated technical writing and editing skills.	C
Demonstrated ability to plan, implement, and evaluate the achievement of goals, objectives, and work plans.	B
Demonstrated initiative, sound judgment, efficiency, independence, and reliability in the completion of tasks, projects, and other major responsibilities.	C
Demonstrated knowledge and ability in negotiation and conflict resolution techniques relative to the role.	B
Demonstrated ability to be accurate and detail orientated.	C
Demonstrated ability to maintain strict confidentiality regarding sensitive information, tax, and revenue matters.	C
Demonstrated knowledge of purchasing rules, policies, procedures, and state procurement guidelines.	C

Degree of Proficiency

A: A degree of knowledge, skill or ability commensurate with elementary-level tasks and assignments.

B: A degree of knowledge, skill or ability commensurate with intermediate-level tasks and assignments.

C: A degree of knowledge, skill or ability commensurate with advanced-level tasks and assignments.

D: An advanced degree of knowledge, skill or ability commensurate with considerable experience and the application of the competency to non-standard tasks and assignments.

E: The most advanced degree of knowledge, skill or ability evidencing complete mastery and understanding of the subject.